February 2008 SiteManager Summary of Changes

The following changes will take place:

1) Contract time adjustments due to delay in issuing a Notice to Proceed will be entered by Central Office Records and Documents Library section. This change will be reflected in two windows within SiteManager:

   a. Contract Time Adjustments window (see attached training document).
   b. All adjustments to time on a contract via a Change Order or an entry in the Contract Time Adjustment window is reflected in the Contract window, Critical Dates tab, Adjusted Completion Date

   The users that have access to estimates will have viewing access to the Contract Time Adjustment window.

2) Estimate approval In-Box Notification

   a. When an estimate is approved, a SiteManager In-Box notification will be sent to the "Central Office Finance" group indicating that "Estimate 1234 for contract AB-12345 has been approved."

   b. When Accounting verifies they have received the flat file and paperwork for the estimate and the estimate is ready for processing, Accounting will enter the date of verification and ready for processing in the "Accounting Received Date" field located in the "Accounting Received Date" window in SiteManager. This field is contract/estimate specific.

      (1) The users that have access to estimates will have viewing access to the Accounting Received Date window.
      (2) Previous estimates that have been sent for processing by Accounting will have a 02/11/08 date in the Accounting Received Date window.

   c. Upon saving the "Accounting Received Date" field with data, a SiteManager In-Box notification will be sent to the PE/S for the contract as indicated in the Contract window and the PE/S that approved the estimate indicating "Estimate 1234 for contract AB-12345 has been received by Accounting and is ready to be processed." This step will occur for only new estimates being approved.

   d. See attached training document.

3) The item quantities on the current generated estimate can be viewed in the Estimate Item Detail window. The Estimate Item Detail window displays the item quantities from authorized Daily Work Reports.

Viewing rights to Estimate Item Detail, as trained with the Generating Contract Pay Requests training document and the Viewing the Contract Pay Estimate training document will be turned on to the groups that have estimate viewing rights in SiteManager.

4) This Estimate Item Paybook is a view only window showing the payment history for a Contract Item. The Estimate Item Paybook window displays the item quantities from authorized Daily Work Reports.

   Viewing rights to Estimate Item Paybook, as trained with the Generating Contract Pay Requests training document and the Viewing the Contract Pay Estimate training document will be turned on to the groups that have estimate viewing rights in SiteManager.

5) Frequently Asked Questions will be posted on the SiteManager Reports website located at https://sitemanager.in.gov. You will need to enter your SiteManager User ID and Password to access the information.